

Managing Active Solicitations

WebProcure User Activities



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Training Objectives


The purpose of this training session is to cover the key features and functionality of this Managing Active Solicitations module.

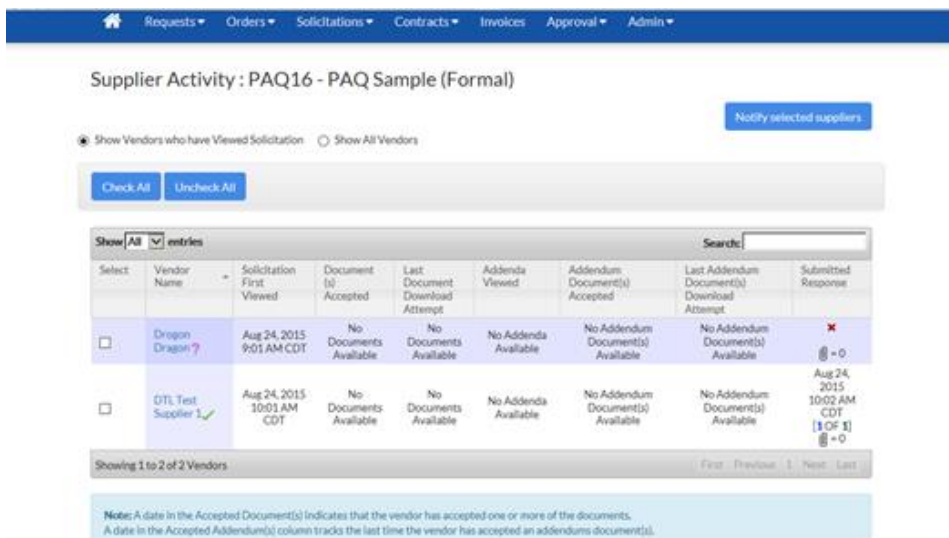
At the conclusion of the training session, you will be able to:


- ☐ **Analyze and take action on Vendor Activity Report**
- ☐ **Analyze Audit Report**
- ☐ **Create an addendum in Active Solicitation**
- ☐ **Analyze Solicitation History and Version Comparison**

Activity 1 Managing an Active Solicitation

Activity 1.1 Review Vendor Activity Report

1. Click Action Icon  Note: Depending on your solicitation status, you may need to click the Additional Icons (3 dots) to see the list of additional functions, including the Vendor Activity Icon
2. Check whether vendors have accepted the documents associated with solicitation.
3. If the activity is low, you may want to send a notification to suppliers.




Select	Vendor Name	Solicitation First Viewed	Document (s) Accepted	Last Document Download Attempt	Addenda Viewed	Addendum Document(s) Accepted	Last Addendum Document(s) Download Attempt	Submitted Response
<input type="checkbox"/>	Dragon Dragon	Aug 24, 2015 9:01 AM CDT	No Documents Available	No Documents Available	No Addenda Available	No Addendum Document(s) Available	No Addendum Document(s) Available	 0
<input type="checkbox"/>	DTL Test Supplier 1	Aug 24, 2015 10:01 AM CDT	No Documents Available	No Documents Available	No Addenda Available	No Addendum Document(s) Available	No Addendum Document(s) Available	Aug 24, 2015 10:02 AM CDT 1 OF 1 0

4. Click Done

Activity 1.2 Review Audit Report

Activity 1.2.1 View Audit Detail

1. Click the View Solicitation option from the Home page
2. The Audit icon is available on all solicitation pages
3. Click Action Icon  to view more details on any solicitation (Depending on where your solicitation created during training is in its lifecycle, determines the appropriate page to access (Current, Award, Archive))
4. The Audit Records page displays
5. The Audit Details will vary for each solicitation, review the entries for the solicitation that you have created
6. Click on the Title link of the first Audit detail displayed
7. View the detail of the event
8. Click the Close button

Activity 1.2.2 Create a Manual Audit Detail

1. Click the Create Manual Audit button
2. Type "Supplier Document" in the Title field
3. Type "Supplier ABC Office Furniture neglected to attach a Bid response document. Supplier sent the document via and I am attaching it for the supplier to the Audit log for documentation purposes" in the Description field

Note: When performing a Keyword search for audit entries the search is based on the data within the Description field. The Title of the Audit Entry is not searchable in a Keyword search.

4. Click the Attach Document(s) link
5. Click the Browse button
6. Select a document from your computer and click the Open button.
7. Click the Save button.
8. Enter a description of the Document just attached in the Description field
9. Click the Save button
10. Click the OK button
11. Click Done


Note: Manual Audit Records can be edited or deleted by the user that created the manual audit entry only. All other users accessing a manual audit entry will have read-only access





Title	User	Description	Date	Actions
Response	Dee Taylor	Supplier DTL Test Supplier L...	Aug 24, 2015 10:03:42 AM CDT	
Workflow Pre-Issue Submit	Carol Capek	The solicitation was submitted...	Aug 19, 2015 3:03:50 PM CDT	
Supplier	Carol Capek	Supplier UT Test Vendor IV was...	Aug 19, 2015 2:51:27 PM CDT	
Supplier	Carol Capek	Supplier UT Test Vendor was...	Aug 19, 2015 2:51:27 PM CDT	
Supplier	Carol Capek	Supplier UT Test Vendor III...	Aug 19, 2015 2:51:27 PM CDT	
Supplier	Carol Capek	Supplier UT Test Vendor was...	Aug 19, 2015 2:51:27 PM CDT	
Supplier	Carol Capek	Supplier Carolyn Closed File...	Aug 19, 2015 2:51:27 PM CDT	
Supplier	Carol Capek	Supplier Ma Hubble was added...	Aug 19, 2015 2:51:27 PM CDT	
Supplier	Carol Capek	Supplier UT Exempt Vendor Test...	Aug 19, 2015 2:51:27 PM CDT	

See 8 Ref Solicitation Audit Activities for more detail

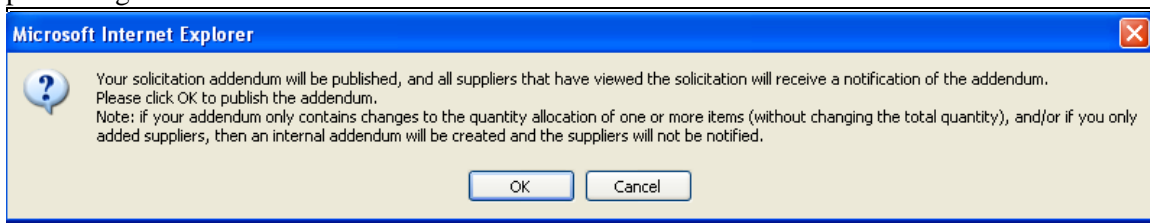
Activity 1.3 *Creating an Addendum for an Active Solicitation*

Note: Once a Solicitation is Active any changes made to the solicitation will result in an Addendum. If there is an Addendum workflow established for the originator of the Solicitation, any changes made to an Active Solicitation will require submission into the Addendum workflow. All approvals must be received by the pre-defined approvers or group of approvers prior to the Addendum becoming the Active version of the solicitation.

1. On the **Current** page select the Active Solicitation tab
2. Click the Create Addendum icon 
3. A dialog box will open up asking if you are sure you wish to create an addendum. Must click "OK"
4. The Solicitation will open in the Editable state.
5. Click Edit button within the Solicitation section that requires modification or click the Edit *Section name* that required modification from the sub-navigation bar



6. Make the modifications to the Solicitation page selected
7. After all modifications are complete scroll to the bottom of the page and click 
8. Click  at the bottom of the page
9. Click  at the bottom of the page to return to the **Current** page
10. Click the Submit Addendum icon  from the **Actions** column
 - Option to submit from summary page, click Submit button.
11. Depending on **Addendum workflow** configurations there are two possible outcomes:
 - a. **No Addendum workflow**
 - i. Solicitation addendum becomes the **Active** version and notifications of Solicitation Addendum are dispatched to all suppliers that have previously viewed/responded to the solicitation

Depending on your status of solicitation and its workflow, this message may come up about publishing:




- b. **Addendum Workflow**
 - i. The Solicitation will be submitted into the pre-configured Addendum workflow for the originator of the solicitation

- ii. After all approvals have been received from configured approver or group of approvers, the solicitation addendum will become the **Active** version of the solicitation and notifications of Solicitation Addendum are dispatched to all suppliers that have previously viewed/responded to the solicitation

NOTE: Until the Addendum for the solicitation is approved, the  View Solicitation Summary will display the solicitation for the Active version (the Addendum has not yet been approved and therefore has not taken effect yet). If the approver wants to see what is changing on the solicitation via the Addendum transaction they must view the  Compare Version with last Solicitation icon.

Activity 1.4 Solicitation History and Version Comparison







1. Solicitation History can be accessed for a solicitation throughout the lifecycle of the solicitation (Current, Award, Archive)
2. Click the Solicitation History icon  from the **Action** Column. Note: Depending on your solicitation status, you may need to click the Additional Icons (3 dots) to see the list of additional functions, including the Solicitation History
3. The **Solicitation History** page will display as shown below:

Solicitation History


Solicitation Number
Solicitation Title
Start Date & Time
End Date and Time
Organization

Sol Train 13-Shea
Shea's Training Solicitation for Evaluation and Award
Oct 13, 2008 4:00 PM EDT
Oct 25, 2008 9:00 AM EDT
City Of Grand Rapids

Close

Select	Sol. No.	Ver. No.	Buyer	Status	Activation Date & Time	Actions
<input type="checkbox"/>	Sol Train 13-Shea	Original	S GR	Amended	Oct 13, 2008 4:00 PM EDT	 
<input type="checkbox"/>	Sol Train 13-Shea	01	S GR	Amended	Oct 13, 2008 11:07 PM EDT	 
<input type="checkbox"/>	Sol Train 13-Shea	02	S GR	Active	Oct 14, 2008 8:46 PM EDT	 

Compare Versions

4. All versions of the solicitation will be listed
5. Select two versions of the solicitation to compare by clicking in the checkbox  to the left of each version
6. Click

Compare Versions
7. A dialog box will open up warning that this may take a while. Must click "OK"
8. View the selected version of the solicitation - all changes between the selected versions are highlighted in yellow.
9. Click close at the bottom of the screen after finished viewing comparison.
10. Click "Done" at the bottom of the screen to return to the Award Formal Solicitations home page

Activity 1.5 Cancellation of Solicitation

1.5.1 Cancel a Solicitation Prior to Publication (before Issued)

1. Identify the Unissued Solicitation you are interested in Canceling

Un-Issued Solicitations		Active Solicitations					
Solicitation #	Title	Buyer	Start Date	End Date	Status	Actions	
16000948	Solicitation from Contract - CC16000937-	P BaconTest	Jun 1, 2016 8:00 AM CDT	Jun 8, 2016 2:00 PM CDT	Not Submitted		
16000949	Solicitation from Contract - CC16000937-	P BaconTest	Jun 1, 2016 8:00 AM CDT	Jun 8, 2016 2:00 PM CDT	Not Submitted		
16000950	Solicitation from Contract - CC16000937-	P BaconTest	Jun 1, 2016 8:00 AM CDT	Jun 8, 2016 2:00 PM CDT	Not Submitted		
CPPC16000793	Linens and Towels for Department of Natu	E Administrator	Jun 1, 2016 8:00 AM CDT	Jun 8, 2016 2:00 PM CDT	Not Submitted		
CPPC16000845	Linens and Towels for Department of Natu	E Administrator	Jun 1, 2016 8:00 AM CDT	Jun 8, 2016 2:00 PM CDT	Not Submitted		
CPPC16000945	Linens and Towels for Department of Natu	E Administrator	Jun 1, 2016 8:00 AM CDT	Jun 8, 2016 2:00 PM CDT	Not Submitted		
CPPC30034901600425	Linens and Towels for Department of Natu	L Palazzolo	Jun 1, 2016 8:00 AM CDT	Jun 22, 2016 2:00 PM CDT	Not Submitted		
IFB16000868	No line item test	E Administrator	Jun 1, 2016 8:00 AM CDT	Jun 8, 2016 2:00 PM CDT	Not Submitted		
IFB16000978	CJC Test Cancellation	C Capek	Jun 1, 2016 8:00 AM CDT	Jun 8, 2016 2:00 PM CDT	Approved		

- Click 3 dots to expand options, select the Cancel/Retract icon (Retract / Cancel)

IFB16000978	CJC Test Cancellation	C Capek	Jun 1, 2016 8:00 AM CDT	Jun 8, 2016 2:00 PM CDT	Approved		
RFPT30034901600915	Solicitation from Contract - CT1600873-0	R BurgessTest	May 31, 2016 3:30 PM CDT	Jun 1, 2016 9:00 AM CDT			

Displaying: 1-10 / 18

- Following Message will appear, Click Ok

Are you sure you want to cancel solicitation IFB16000978?

Click OK to retract or Cancel to ignore.











OK

Cancel





- NOTE: Solicitations that are Cancelled prior to Issuance are removed from the display and not accessible online**
- Click OK

1.5.2 Cancel a Solicitation After to Publication (Issued)





1. Identify the Solicitation you are interested in Canceling

Un-issued Solicitations		Active Solicitations					
Solicitation #	Title	Buyer	Start Date	End Date	Status	Actions	
IFB16000977	CJC Test Cancellation	C Capek	May 31, 2016 8:00 AM CDT	Jun 8, 2016 2:00 PM CDT	Active	    	
SFSS30034901600492	Building Energy Codes Program	L Ortmeier	Feb 19, 2016 3:00 PM CST	Jun 30, 2016 2:00 PM CDT	Active	    	



Below is view of Solicitation in Vendor View:

IFB16000977	State of Missouri - Stage	CJC Test Cancellation	New	May 31, 2016 8:00 AM CDT	Jun 8, 2016 2:00 PM CDT	8d:5h:21m	Active	   
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And after a Vendor has Responded:

IFB16000977	State of Missouri - Stage	CJC Test Cancellation	Responded	May 31, 2016 8:00 AM CDT	Jun 8, 2016 2:00 PM CDT	8d:5h:19m	Active	   
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Below is view of Solicitation on State Bid Board:

Bids or Quotes About To End							
Organization	Solicitation Number	Solicitation Title	Status	Issue Date	End Date	Actions	
State of Missouri - Stage	IFB16000977	CJC Test Cancellation	OPEN	May 31, 2016 8:00 AM CDT	Jun 8, 2016 2:00 PM CDT	 	

And Details on Bid Board:

Contact Information

Solicitation No: IFB16000977 from State of Missouri - Stage

Carol Capek
301 West High Street, Room 570 Jefferson City MO, 65101 United States
Tel: 616.498.2567
Fax:
carol.capek@perfect.com

Solicitation Header Information

Duration Dates	<i>Start Date</i> May 31, 2016 8:00 AM CDT	<i>End Date</i> Jun 8, 2016 2:00 PM CDT
Solicitation Title	IFB16000977 CJC Test Cancellation	
Delivery Terms	Free On Board Destination	
Description	Create Informal Bid, generate cancellation for documentation	
Payment Terms	Vendor Specified	

- Click Solicitation Vendor Activity Report to see who has viewed or responded to Bid and to gather additional information. On this screen you can see the directly impacted vendors that have MissouriBUYS/WebProcure logins and have viewed or submitted bids ó you can use the Notify Selected Vendors if you needed to send a group email to let them know the Bid will be cancelled ó this can be sent to all who viewed, responded, or were invited, but see separate notice to these below at time of cancellation also.

Supplier Activity : IFB16000977 - CJC Test Cancellation (Informal)

☒ Show Vendors who have Viewed Solicitation
 ☐ Show All Vendors
 Notify selected suppliers

Check All
Uncheck All

Select	Vendor Name	Solicitation First Viewed	Document(s) Accepted	Last Document Download Attempt	Addenda Viewed	Addendum Document(s) Accepted	Last Addendum Document(s) Download Attempt	Submitted Response
<input type="checkbox"/>	Test Supplier Three-MO ✓	May 31, 2016 9:09 AM CDT	No Documents Available	No Documents Available	No Addenda Available	No Addendum Document(s) Available	No Addendum Document(s) Available	✗
<input type="checkbox"/>	Test Supplier Two-MO ✓	May 31, 2016 8:38 AM CDT	No Documents Available	No Documents Available	No Addenda Available	No Addendum Document(s) Available	No Addendum Document(s) Available	May 31, 2016 8:39 AM CDT [2 OF 2] 0 = 0

Showing 1 to 2 of 2 Vendors

First Previous 1 Next Last

3. If you wish to document the Cancellation within the Bid itself, prior to Cancellation (steps below), Amend the Bid and Change the Title, Description or other items prior to Cancellation. (See Step 7 for Final Examples). Save and get approval on the Amendment.

- a. For Example:

Bid Title:

CANCELING: CJC Test Cancellation with Amendment to Doc (REBID at Future Date)

Bid Description:

Description

Create Informal Bid, generate cancellation for documentation

Due to Additional Information, this Bid is being cancelled and will be rebid at a future date

- b. Update, Save and Submit for Approval 6 following will appear

Your solicitation addendum will be submitted for approval. Please click OK to submit.
 Note: if your addendum only contains changes to the quantity allocation of one or more items (without changing the total quantity), changed estimated total and/or if you only added suppliers, then an internal addendum will be created and the suppliers will not be notified.






OK

Cancel


- c. Click OK
- d. Document now appears in Active Bids as follows:



Un-issued Solicitations		Active Solicitations						
Solicitation #	Title	Buyer	Start Date	End Date	Status	Actions		
IFB16000979	CANCELING: CJC Test Cancellation with Am	C Capek	May 31, 2016 10:15 AM CDT	Jun 8, 2016 2:00 PM CDT	Active			

And in Vendor View:

IFB16000979	State of Missouri - Stage	CANCELING: CJC Test Cancellation with Amendment to Doc (REBID at Future Date)	Responded	May 31, 2016 10:15 AM CDT	Jun 8, 2016 2:00 PM CDT	8d:3h:6m	Amended	    
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And in Public Bid Board:


 Bids or Quotes About To End

Organization	Solicitation Number	Solicitation Title	Status	Issue Date	End Date	Actions
State of Missouri - Stage	IFB16000979	CANCELING: CJC Test Cancellation with Amendment to Doc (REBID at Future Date)	AMENDED	May 31, 2016 10:15 AM CDT	Jun 8, 2016 2:00 PM CDT	 

Bid Details:

Solicitation Header Information		
Duration Dates	<i>Start Date</i> May 31, 2016 10:15 AM CDT	<i>End Date</i> Jun 8, 2016 2:00 PM CDT
Solicitation Title	IFB16000979 CANCELING: CJC Test Cancellation with Amendment to Doc (REBID at Future Date)	
Delivery Terms	Free On Board Destination	
Description	Create Informal Bid, generate cancellation for documentation Due to Additional Information, this Bid is being cancelled and will be rebid at a future date	
Payment Terms	Vendor Specified	








4. Click 3 dots to expand options, select the Cancel/Retract icon ( Retract / Cancel)



Un-issued Solicitations

Active Solicitations

Solicitation #	Title	Buyer	Start Date	End Date	
IFB16000977	CJC Test Cancellation	C Capek	May 31, 2016 8:00 AM CDT	Jun 8, 2016 2:00 PM CDT	Active

 Print Solicitation
 Solicitation History
 Solicitation Vendor Activity Report
 Retract / Cancel
 Send Supplier Message
 Download Solicitation Documents
 Collaboration Center

5. Following Message will appear, Click Ok

Are you sure you want to cancel solicitation IFB16000978?

Click OK to retract or Cancel to ignore.

OK

Cancel

6. All Vendors Invited, Viewed, Responded will be sent a notice of Cancellation:

Informal Solicitation Retracted

The following suppliers are being notified of your decision regarding this solicitation:

InfoSource, Inc.
CooperComm Inc
SchoolCity Inc
ProTech Professional Technical Services, Inc.
TMT Consulting
The Agileist LLC
Pathfinders Professional Development, LL
Jubabees heating and Cooling LLC
NCC Group LLC
CBT Nuggets LLC
Workplace Answers LLC
Leadership Studies Inc
illumisoft
MAXIMUS, Inc.
Super Duper Inc
TURNIT SOFTWARE SOLUTIONS LLC
Jody Urquhart
Duffy Consulting LLC
TransAmerica Training Management, Inc.
Division of Purchasing
Learnsoft Technology Group, Inc.
Elevate USA Inc
PhishLine LLC
KSA Partners LLC
SMS Tech Solutions, LLC
Firefighters Bookstore
East Kansas Horizons LLC
Candorum Consulting LLC
Test Supplier Two-MO
Resource Center for Customer Service Professionals
SHI International Corp
Key Asset Lifecycle Management Services
The Summers Advisory Group Inc
Dell
World Wide Technology, Inc
Amber Ernst
M&M Micro Systems Inc.

Engineerica Systems Inc
Deemsys Inc
InstructionalMD
Bio Company Inc
Allen Gibbs & Houlik LC
GlennView Strategies, LLC
Exit Certified Corp
ABCreative Inc
Systems Technology Group, INC
Drury Inn & Suites St Louis Convention C
International Business Machines Corporation
Star Thrower Distribution Corp
BocaVox, LLC
43Tc LLC
MindPlay Inc
Sprigeo Inc
Philips & Associates Inc
Test Supplier Three-MO
Office of Equal Opportunity
Coastal Training Technologies
Pope & Associates, Inc.
Diversity Compliance and Testing Group Inc
Global Gov/Ed Solutions Inc.
Tata America International Corp.
Amplify Education, Inc.
Training Technologies and Support, Inc
Business Training Library Inc
Professional Development Services

SUPERSTAR MARKETING
Tutor.com, Inc.
The Teachers Lounge Inc
Emergency Planning Management Inc
Dale M McCoy
Enterprise Training Solutions
Apex Learning Inc.
Sharla Riead
SkillSoft









Close

7. Click Close and the Bid(s) will now show up under Solicitations/View Archived Informal Solicitations (or Formal if your cancellation was a Formal Solicitation)

Finalized Solicitations

Retracted/Canceled Solicitations

Informal Solicitations that have been either canceled or retracted.

Solicitation Number	Title	Buyer	Start Date	End Date	Actions
IFB16000977	CJC Test Cancellation	C Capek	May 31, 2016 8:00 AM CDT	Jun 8, 2016 2:00 PM CDT	   
IFB16000979	CANCELING: CJC Test Cancellation with Am	C Capek	May 31, 2016 10:15 AM CDT	Jun 8, 2016 2:00 PM CDT	   

And now no longer appear on Vendor View ó but all affected suppliers would have gotten an email to that effect.

And now appear on Public Bid Board ó as Canceled/Retracted with no Actions ó so any vendor that had searched for it (without a MissouriBUYS vendor registration will be able to see the cancellation):

Bids or Quotes About To End						
Organization	Solicitation Number	Solicitation Title	Status	Issue Date	End Date	Actions
State of Missouri - Stage	IFB16000979	CANCELING: CJC Test Cancellation with Amendment to Doc (REBID at Future Date)	CANCELED/RETRACTED	May 31, 2016 10:15 AM CDT	Jun 8, 2016 2:00 PM CDT	
OA - FMDC - Bldg Ops - West (State of Missouri - Stage)	RFI16000976	Testing 5302016	OPEN	May 31, 2016 8:00 AM CDT	Jun 14, 2016 2:00 PM CDT	
State of Missouri - Stage	IFB16000977	CJC Test Cancellation	CANCELED/RETRACTED	May 31, 2016 8:00 AM CDT	Jun 8, 2016 2:00 PM CDT	